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ABSTRACT

This presentation outline with overheads demonstrates differentiated planning, a system with four separate planning methods designed to reduce confusion and increase staff commitment to planning efforts. Differentiated planning involves: (1) prioritization (used for single question issues, multiple question issues, and as a follow-up to the development of vision/mission statements); (2) research cycle (used when an answer probably exists somewhere else, when research that will surround the problem probably exists, and when teams need a quick, high-probability successful solution); (3) chainsaw planning; and (4) strategic planning (which is seldom used, but can be used at the beginning of a new leader's time in an organization). The paper discusses decision making strategies to increase staff buy-in; evaluation strategies for planning efforts; current research on effective team functioning; and improving team functioning (conflict resulting from: lack of focus; differing philosophies, processes, and practices; inappropriate interpersonal behaviors or inappropriate behaviors during conflict; varying perceptions regarding decision making, leadership, management, and supervision; and bad behavior). The paper also includes: research results on differentiated planning; differentiated planning worksheets and a matrix; sample vision and mission statements; and data on why teams fail and causes of school conflict. (SM)

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ED 451 141

NSDC@Atlanta.2000 - the future is here
Tuesday, December 5, 2000 • 9:00 AM

A Set of Planning Tools for School Leaders & Teams: *Differentiated Planning*

Abstract

This presentation will demonstrate *Differentiated Planning*; a system with four separate, easy to use planning methods that reduce confusion and increase staff commitment to planning efforts. The session will include:

- Four specific planning models for schools
- Methods to increase staff "buy-in"
- Decision-making techniques that reduce conflict among staff
- Evaluation strategies

B. H. Miles

About the Presenter...

Dr. Bruce H. Miles is the CEO & Owner of the Big River Consulting Group. For the past five years, he was an Assistant Professor in the College of Education at St. Cloud State University & taught coursework in the areas of leadership & administration. Bruce has served as a consultant to schools and districts for the past 12 years and is an author of articles, and a reviewer for journals and books.

Bruce works with schools, businesses and non-profit agencies across the United States and Canada, and specializes in the areas of:

- Data collection & analysis
- Strategic planning
- Organizational effectiveness
- Leadership training
- Behavior Management
- Data-based decision-making
- Reducing organizational conflict
- Workplace climate issues
- Personnel issues & decisions
- Special Education

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Orientation 9:00

- Introductions: Colleagues & Bruce H. Miles, Ed.D.
- Goals for today's session
  1) Review four specific planning models for schools
  2) Review methods to increase staff "buy-in"
  3) Review decision-making techniques that reduce conflict among staff
- Survey Results (overheads)
- Your prior experiences with planning an/or & teams in schools/districts?
  1) Good experiences?
  2) Less than...?
  3) Notice any trends?
  4) Quality indicators: Effective planning?

Overview: Planning Models 9:10

- Effective Schools (handout #1)
- Differentiated Planning (handout #2) & planning models (overheads)
- Special note: Horizontal elements on the Johnson Planning Model
- Effective elements & processes within those models

Why Planning is Hard for School Staff & Admin 9:15

- Teachers' predisposition toward a linear nature
- Uncertainty
- Perceived shortage of resources = a "scarcity philosophy"
- Lack of training, or lack of experience w/ successful planning
- Time issues

ID Desired Session Outcomes 9:20

- Break out into small groups
- Identify desired session outcomes
- Large group - Review data from small groups

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Shortcuts to Vision & Mission Statements 9:40

- **Vision Statements Describe:** (handout #3)
  - A) An ideal organization
    - "A top-ten University"
    - "The best restaurant in town: Your 1st choice for fine dining"
  - B) Ideal Services
    - "The University that provides unmatched customer service"
    - "The Restaurant that provides unmatched attention & service"
  - C) Ideal Products
    - "Producing flawless vehicles at a reasonable cost"
    - "A 200-pound buck hanging in a tree by 10:00 AM Saturday"

- **Mission Statements Describe:**
  - A) What an organization will do
    - "Provide an excellent education at an average price"
    - "Provide the best food and the best service in our area"
  - B) What services will be provided
    - "Make our customers' lives easier by replacing all auto glass with no disruption in their work or home schedules"
    - "Need credit? Bad credit? We arrange loans for anyone"
  - C) What products will be delivered
    - "On-time delivery, every time"
    - "A deer hunt with flawless planning & attention to detail"
  - D) How lives will be changed
    - "Providing an exceptional environment & instruction, & first-class equipment to help our customers improve fitness"

Simulation: Vision & Mission Shortcuts 9:50

- **Strategies for the development of vision or mission statements**
  - A) Surveys (for internal and/or external consumers)
    1. Sample prompts for vision statements
       a. What will happen in our ideal world?
       b. What would be the best that we could do?
       c. How would our current consumers benefit the most?
    2. Sample prompts for vision statements
       a. What will we do as an organization to get there?
       b. What would our organization's job description be?
       c. What would be expected from a flawless organization?
  - B) Internal and/or external consumer session (30 mins, 40 people)

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B) Internal and/or external consumer session (30 mins, 40 people)
a. Break out into groups of 3
b. Review prompts from above section
c. Draft a statement
d. Post all visions
3. Each gets 4 dots; vote for statement(s) that look good

Process Analysis, Q & A, Tips for Vision/Mission 10:10

Differentiated Planning Method #1: Prioritization 10:20

- Differentiated Planning (handout #2)
- Uses
  1. Single question issues
  2. Multiple question issues (Behavior Audit overhead)
  3. As a followup to development of vision/mission statements
- Your experiences w/ prioritization?
- Issue noted by "Ostentatious High School"

Simulation: Prioritization 10:35

- Clay County Collaborative (handouts #4A & #4B)
- Purpose of this exercise: Use all participants' knowledge & experiences to develop broad goal areas to deliver vision & mission (above)
- Small groups (break out by cards): Identify goal headings needed
- Large group: Review & prioritize small groups' lists of goal areas

Process Analysis, Q & A, Tips for Prioritization 10:50

- The next steps in this process would be:
  - Small groups: Develop goals under each heading
  - Large group: Prioritize goals under each heading

Break! 11:00

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Differentiated Planning Method #2: Research Cycle 11:10

- Differentiated Planning (handout #2)
- Research Cycle Worksheet (handout #5)
- Uses
    1. When an answer probably exists somewhere else
    2. When research that will surround the problem probably exists
    3. When a team needs a quick, high-probability successful solution
- Your experiences w/ the research cycle as a planning tool?
- Warning: the cycle does not require specific timelines, responsibilities, etc.

Simulation: Research Cycle 11:25

- Small groups (break out by cards): ID issues, problems that might be successfully investigated/ solved by use of the research cycle
- Large group: Review & prioritize small groups' lists of goal areas

Process Analysis, Q & A, Tips for Vision/Mission 11:40

Coming Attractions (PM Session) 11:50

- "Chainsaw" Planning (Differentiated Planning Method #3)
- Strategic Planning (Differentiated Planning Method #4)
- Increasing staff "buy-in" to planning efforts
- Why teams fail
- Causes of conflict in schools
- How to address & manage conflict in schools
- ID,of, & dealing with difficult school staff

Big Break! 11:55

- See you @ 2:45

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Welcome Back 2:45

• PM session = 2 more planning tools & strategies to get staff to "buy in"

Differentiated Planning #3: "Chainsaw" Planning 2:50

• Problem ID & Sorting:
  1) 2 x 2 Outcome Diagnosis Grid (handout #6)
  2) Big Mountains/Little Mountains (handout #7)
• "Chainsaw" Planning (handout #8)

Preliminary: Invite the entire group to identify & prioritize issues

• Break into groups of 3 and...
  "Identify all of the problems within this issue."
• List all sub-issues in a central location, acknowledge when posted
• Prioritize problems, thank & dismiss large group

Step 1: Admire the Problem (5 minutes)

• Ask a goal group of 3 or 4 people to:
  "Identify all of the sub-problems within this issue, & hurdles that will be in our way as we try to solve the problem."

Step 2: Developing a Goal (5 minutes)

• Ask the small group to...
  "Write a goal, in 20 words or less, in words that Joe & Josephine six-pack (or Joe & Josephine 7-11) will understand, that will wipe out as many of the issues or small problems as possible."
• Caution: Many groups' goals will be too specific and actually be objectives. Guide to a more global goal or "raise the bar".

Step 3: Developing Objectives (10 minutes)

• Have them...
  "Identify four steps necessary to reach our goal."

Step 4: Identify Needed Resources & Develop Timeline (9 minutes)

• Ask the group to...
  "ID necessary resources & a suggested timeline per objective."

Step 5: Identify How to Measure Progress (5 minutes)

• Ask the team to decide on a...
  "Quantitative measure" (Hard data: scores, $, %, etc.);and/or a
  "Qualitative measure: (Soft data: perceptions, attitudes, etc)

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Simulation: "Chainsaw" Planning 3:10

- Small groups (break out by cards):
  1) Quickly imagine a goal area from one of your schools
  2) Complete steps 1, 2, 3 (Admire, Goal, Objectives) on the matrix
- Large group: Review & prioritize small groups' lists of goal areas

Process Analysis, Q & A, Tips for the "Chainsaw" 3:30

Differentiated Planning #4: Strategic Planning 3:40

- Large group: ID elements of traditional strategic planning
- Large group: ID timelines for traditional strategic planning
- Uses
  1) Seldom
  2) @ the beginning of a new Leader's time in an organization

Process Analysis, Q & A, Tips for Strategic Planning 3:50

Decision-making Strategies to Increase Staff "Buy-In" 4:00

- The folly of "Consensus" & Miles' Bell Curve Theory
- Decision-Making Techniques & "Consensus" Tools
- Separating the "Will do", the "That's OK by me", & the "No way" types
  A) Adhesive dots as prioritizers
  B) Traffic cards as direction indicators (green, yellow, red)

Evaluation Strategies for Planning Efforts 4:15

- Planning resources?
- Evaluate alignment (vision, mission, goals, objs., etc.)
- Evaluate team progress
- Evaluate products
- Evaluation: Can be a combination of
  A) Quantitative
  B) Qualitative
  C) Calhoun, E. (1994). How to use action research in the self-renewing school; ASCD @ (703) 549-9110
- K.I.S.S.

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Current Research re: Effective Team Functioning 4:25

- Why Teams Fail (& why some teams do very well) (handout #9)
- Difficult People (Stress Factors) (handout #10)
- Difficult People (Five Categories) (handout #11)
- My experiences with school teams in decline & growing teams

How to Improve Team Functioning 4:35

1) Conflict Resulting From a Lack of Focus (handout #12)

A) Review or develop a vision & mission
B) Improve school wide decision-making system

2) Conflict Resulting From Differing Philosophies, Process & Practices

A) Improve your planning system
B) Improve your school wide decision-making system
C) Locate & use "best practice" research as a guide

3) Conflict From Inappropriate Interpersonal Behaviors, or Inappropriate Behaviors During Conflict

A) Hold a local norming session; use & reinforce the results
B) Thomas-Kilmann Conflict Mode Instrument (800-759-4266)
C) Improve your school wide decision-making system

4) Conflict From Varying Perceptions re: Decision-Making, Leadership, Management & Supervision

A) The Leader's Window (Beck & Yeagher, 1994; Wiley)
B) Improve your school wide decision-making system

4) Conflict From Bad Behavior

A) Tell people to stop it
B) Use the positive grapevine
C) Read & apply

Whitaker, T. (1999). Dealing With Difficult Teachers. NY: Eye on Education

Buckingham, M. & Coffman, C. (1999) First, Break All The Rules. NY: Simon & Schuster

D) Apply "Differentiated Supervision"

Closure 4:45

- Comments or questions?
- Please fill out the evaluation & enjoy the rest of the Conference!

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Research Results: *Effective Schools*

Frequency With Which Variables Appeared in Effective-Schools Studies Groups

Variable	Frequency of Appearance in the Three Groups
High Expectations	**3**
Safe & Orderly Environment	**2**
Clear & Focused Mission	**2**
Strong Leadership	**2**
Monitoring Student Progress	**1**
Staff Training	**1**
Staff Control Instructional Decisions	**1**

Source:

Rossow, L.F. (1990). The Principalship: Dimensions in Instructional Leadership. New York: Prentice Hall. (Table 1.2 - Page 6)

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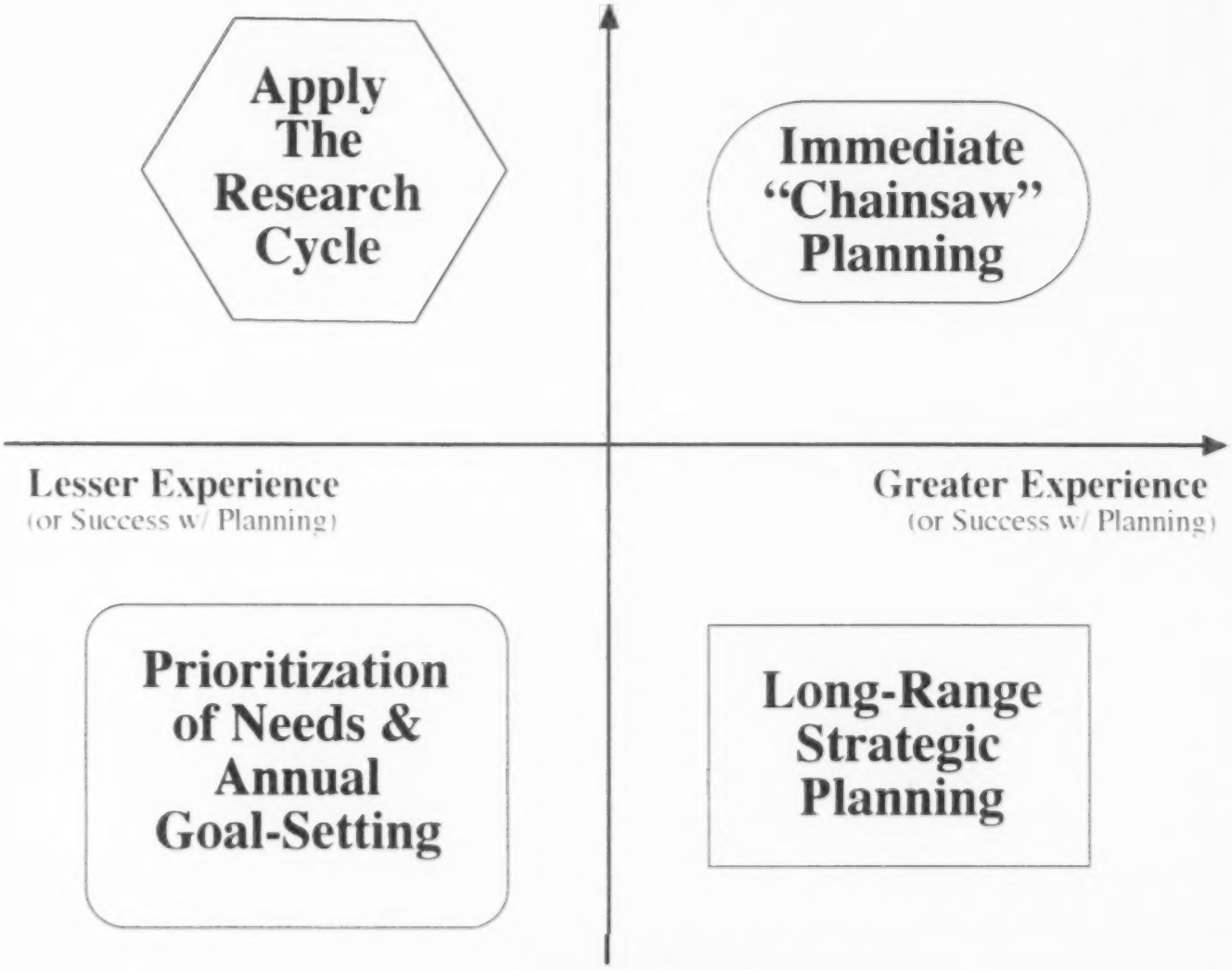
Differentiated Planning System

Greater Need
(High/Severe Crisis or Threat to Organization)



Lesser Need
(Low/No Crisis or Threat to Organization)

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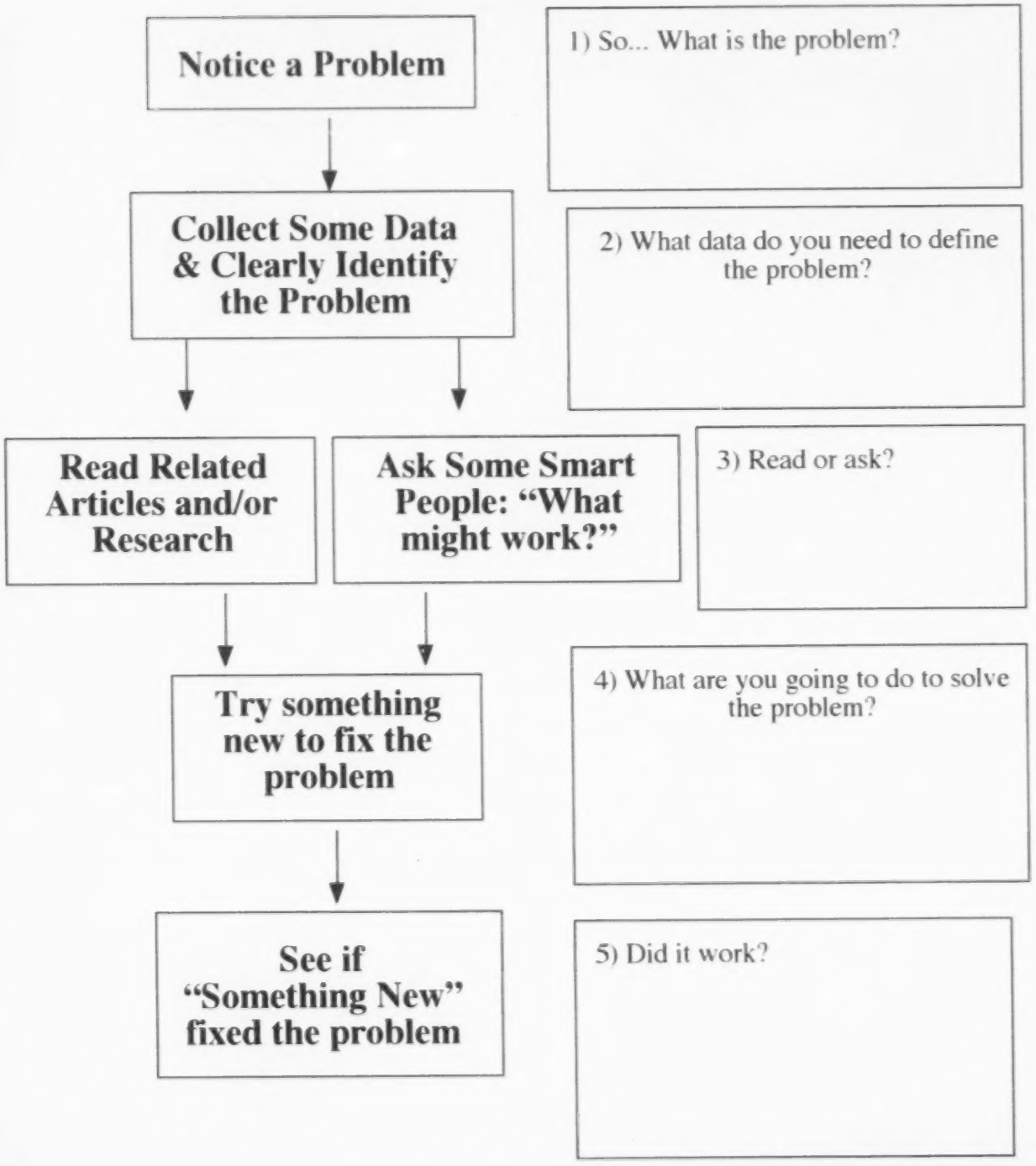
Research Cycle Worksheet


Notice a Problem
1) So... What is the problem?
Collect Some Data & Clearly Identify the Problem
2) What data do you need to define the problem?
Read Related Articles and/or Research
Ask Some Smart People: "What might work?"
3) Read or ask?
Try something new to fix the problem
4) What are you going to do to solve the problem?
See if "Something New" fixed the problem
5) Did it work?

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Planning Matrix

Evaluation Plan (Quantitative and/or Qualitative; 5 minutes)

Timeline (per objective; 3 mins.)	**Resources** (per objective; 3 mins.)	**Responsibility** (per objective; 3 mins.)

Objectives (≤4; 10 minutes)

Goal (in 20 words or less; 5 minutes)

Admiration of the Problem (ID all sub-issues & hurdles; 5 minutes)

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Sample Vision & Mission Statements

Vision Statements Describe...

A) An ideal organization
"A top-ten University"
"The best restaurant in town: Your first choice for fine dining"

B) Ideal Services
"The University that provides unmatched customer service"
"The Restaurant that provides unmatched attention & service"

C) Ideal Products
"Producing flawless vehicles at a reasonable cost"
"A 200-pound buck hanging in a tree by 10:00 AM Saturday"

Mission Statements Describe...

A) What an organization will do
"Provide an excellent education at an average price"
"Provide the best food and the best service in our area"

B) What services will be provided
"Make our customers' lives easier by replacing all auto glass with no disruption in their work or home schedules"
"Need credit? Bad credit? We arrange loans for anyone"

C) What products will be delivered
"On-time delivery, every time"
"A deer hunt with flawless planning & attention to detail"

D) How lives will be changed
"Providing an exceptional environment & instruction, & first-class equipment to help our customers improve fitness"

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Clay County Joint Powers Collaborative
November 17, 2000 • Planning Session

ID Consumers & Prioritize Services 10:45

1) Break out by cards into small groups
- ID consumers of the Collaborative's efforts
- Large group: Prioritize responsibilities & review results

Rank	Votes	Consumers of the Collaborative's Efforts
1	13	Families and extended families
2	11	Children with mental health issues
3	7	Schools, staff, administration
4	6	Preschool children
5 (tie)	4	Children
5 (tie)	4	Children at risk

2) Break out by cards into small groups
- ID services delivered as a result of the Collaborative's work
- Large group: Prioritize services & review results

Rank	Votes	Collaborative's Services
1 (tie)	9	Prevention Services
1 (tie)	9	Community building to vision together and have less "turf" protection
3	7	Intervention Services
4	6	Truancy intervention

Refining the Collaborative's Vision 11:15

- Review sample vision & mission statements (handout)
- Break out by cards into small groups
- Develop a vision statement (What will the future look like with very effective services in place within the Collaborative?)

Community services will be effective and efficient in serving the needs of families and children; fully integrated and uniform; integrated funding...serving the needs of families and children.

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Refining the Collaborative's Mission 12:30

- Break out by cards into small groups
- Use the Vision selected (AM) to develop a Mission (What will the Collaborative do over the next few years to deliver the Vision?)
- Large group: Prioritize vision statements

To deliver integrated services through a "single point of entry" that incorporates shared information, funding and strategies for achieving outcomes.

Develop New Goals 1:10

- Small groups (break out by cards): Identify goal headings
- Large group: Review & prioritize small groups' lists of goal areas
- Small groups: Develop goals under each heading
- Large group: Prioritize goals under each heading

Funding Priorities

Votes	Goal
15	Funding mechanism based on priority needs (non-competitive)
14	Funding plan for collaborative administration and infrastructure

Single Point of Entry System

Votes	Goal
10	Helpworks with universal implementation and consumer access
9	Implement a strategic system-wide single point of entry service assessment tool that is family and agency friendly and cost-effective.

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Improve Communication

Votes	Goal
9	Develop a marketing strategy with the community (i.e., newsletters, ads in paper, web page, etc.
7	Recruit more parents to participate on Board & Advisory Committee

ID Areas in Need of Service

Votes	Goal
6	Every three years do community survey on available services and gaps.

Data Collection: Outcomes

Votes	Goal
7	Establish criteria for measurable outcomes.

Identify Duplication of Services

Votes	Goal
14	One service plan per family crossing multiple discipline agency services.
10	Implementation of wrap-around process for children and families with complex needs and involved with more than once agency

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Why Teams Fail

Although many say team-based pay is critical to the success of teamwork in the workplace, most teams fail for far less expensive reasons.

Why managers say teams failed to meet expectations:

Goals unclear	xxxxxxxxxxxxxxxxxxxxxx	**55%**
Changing objectives	xxxxxxxxxxxxxxxxxxxxxx	**55%**
Lack of accountability	xxxxxxxxxxxxxxxxxxxx	**51%**
Lack of management support	xxxxxxxxxxxxxxxxx	**49%**
Lack of role clarity	xxxxxxxxxxxxxxxx	**47%**
Ineffective leadership	xxxxxxxxxxxxxx	**45%**
Low priority of team	xxxxxxxxxxx	**40%**
No team-based pay	xxxxx	**30%**

(USA Today - Tuesday, February 25, 1997: The Hay Group)

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Causes of School Conflict

Cause #1: Conflict Resulting From Lack of Focus

Possible Remedies

1) Do/review/refine a shared Vision & Mission
2) Improve your schoolwide decision-making system
3) Improve link between philosophy & practice

Cause #2: Conflict w/ Philosophy & Practices

Possible Remedies

1) Improve your planning system
2) Improve your schoolwide decision-making system
3) Locate & use "best practice" research as a guide

Cause #3: Interpersonal Conflict

Possible Remedies

1) "Norming" Session: ID expected interpersonal behaviors
2) Individual nurturing of employees by staff & administration
3) Improve your schoolwide decision-making system

Cause #4: Conflict re: Leadership/Followership

Possible Remedies

1) Identify expected leadership behaviors
2) Identify expected followership behaviors
3) Improve your schoolwide decision-making system

Cause #5: Conflict From Bad Behavior

Possible Remedies

1) Tell people to stop it
2) Use the positive grapevine
3) Read & apply "Dealing With Difficult Teachers"
4) Differentiated supervision

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